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Product Brief

Austrian Market for Fruits and Fruit Products

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Report Highlights:

Domestic fruit production supplies half of consumers' demand. Most imports are from Mediterranean neighbors. However, there is a niche market for some U.S. fresh fruits, nuts, dried fruits, organic fruits, and pulp.

Includes PSD changes: No

Includes Trade Matrix: No

Unscheduled Report

Vienna[AU1], AU

Austrian Market for Fruits and Fruit Products

Domestic Production

Austrian fruit production is concentrated in the regions of the Danube valley and in the eastern and south eastern parts of the country. Fruits are produced by commercial growers, on a non-commercial scale on farms not specialized on fruits, and in home gardens. The non-commercial output is considerably larger than the commercial production. Apples are the main item; they account for more than half of the total annual fruit crop of about 700,000 MT. However, a large share of production is not consumed but remains on trees. This is particularly true for the small, sour cider apples and cider pears.

Domestic production of dried fruits is of little significance and limited to a number of farms which produce primarily dried pear slides followed by dried apple slides and plums. These products are directly sold to consumers or to the food industry. There is practically no production of dried apricots. Dried fruits available in groceries are imported.

The Austrian jam and juice industry is strong and export oriented. However, no production figures are available.

Consumption

Fresh Fruits

By European comparison, Austrian per capita fresh fruit consumption is in the upper range. Annual consumption fluctuates widely - a consequence of varying production volume and price - but shows a rising trend. Consumption rose from 83.8 kg in 1995/96 to 87.9 kg in 1998/99. By 2004/2005, it may reach 88.8 kg. A recent poll showed that 68% of fruits are eaten fresh, 10% as fruit salad, 7% as fresh made juice, and 7% as others.

According to a survey, 86% of consumers buy exotic fruits, 81% citrus fruits, 51% berries, 27% stone fruits, 67% apples/pears, and various nuts 4%. Among fruit types, bananas have the largest purchaser extension.

Table 1: Total Consumption and Per-Capita Consumption and Self Sufficiency in 1998/99

Fruit type	Total fresh consumption in MT	Per capita consumption in kg	Self-sufficiency in %
Apples	201,900	25.0	92
Pears	47,700	5.9	88
Apricots	19,700	2.4	39
Cherries, morellos	25,400	3.1	80
Peaches, nectarines	38,400	4.8	20
Plumes, prunes	40,100	5.0	90
Strawberries	34,300	4.2	33
Other berries	45,800	5.7	48
Table grapes	33,100	3.8	0
Bananas	86,500	10.7	0
Pine apples	12,700	1.6	0
Other fruits	9,700	1.2	0
Total fruits excluding citrus	595,300	73.4	
Oranges	55,000	6.8	0
Mandarins	31,600	3.9	0
Lemons	21,900	2.8	0
Grapefruits	4,400	0.5	0
Other citrus fruits	2,700	0.3	0
Total citrus fruits	115,600	14.3	0
Total fresh fruits	710,900	87.9	61
Various nuts, chestnuts, etc.	35,500	4.4	40
Dried fruits	11,800	1.5	
Total fruits	758,200	93.8	57

Organic Fruits

The rising doubts about the quality of conventionally produced foods and increasing environmental awareness, prompts consumers growing interest in organically produced foods. Main purchasers of organic foods are students and young families with high education level. About two percent of the total food sales of the food retail trade accounts for organic products. Relatively large quantities of organic fruits are imported each year as demand is by far not met by domestic production. Imports are carried out by wholesalers and supermarket chains and distributed by supermarket chains and health food shops.

Processed Fruits

Consumption of jams and compotes is stagnant. However, as home preparation of these products is declining, sales should rise in the future. Fruit juices continue their strong consumption growth. In line with the overall trend of frozen food, frozen fruit consumption show an upward trend. Nevertheless, their share accounts only for an estimated 4% of the total frozen food market.

Distribution Channels

The Austrian fruit market is dominated by supermarket chains, the two largest ones (Billa and Spar) have a market share of nearly 60%. The significance of farmer markets is small; their market share is below 10% and declining. Special fruit shops have never played an important role.

The inner structure of the supermarket chains is very firm and centralized. As a consequence, more commodities and larger quantities are centrally purchased and then delivered to regional distribution centers. The uniformity of the shops and prices of the various supermarket chains has resulted in rising product requirements and quality. Purchasers want rising volumes of merchandise of certain specification, e.g. Golden Delicious, grade one, 75 - 80 milliliter in diameter. Fruits are increasingly sold under brand names.

The major share of imports is carried out by fruit and vegetable wholesalers, that also supply supermarket chains with most imported fruits. Domestically produced fruits are purchased directly by supermarket chains. The smaller shops receive practically all imported fruits through wholesalers.

Fruit Trade

With fresh fruits, Austrian self sufficiency is about 50%. Due to climatic conditions, the country's self-sufficiency is considerably lower than that of the southern EU members. Thus, a large share of import fruits comes from Mediterranean countries.

For many years, fruit imports have been permanently rising by volume as well as by value. In 1999, Austrian imports were 586,100 MT, valued AS 5.45 billion (\$ 422 million) (540,200 MT valued AS 5,61 billion (\$ 453 million) in 1998), whereas exports amounted at only 72,000 MT, valued AS 656 million (\$ 30.8 million).

Table 2: Fruit Imports in 1999

Fruit type	Volume in 1,000 MT	Value in AS million	Value in US \$
Apples	118.4	340.0	26.3
Pears	18.7	160.3	12.4
Stone fruits	56.6	604.0	46.8
Berries	42.3	683.0	52.9
Grapes, fresh	36.8	459.8	35.6
Grapes, dried	5.4	83.6	6.5
Figs, fresh, dried	2.1	39.5	3.1
Bananas	102.1	891.5	69.0
Pineapples	4.9	69.1	5.4
Melons, papayas	30.5	186.4	14.4
Other fresh fruits (excl.citrus)	26.1	403.6	31.8
Total fr. fru. (excl.citrus)	443.9	3,900.8	304.2
Oranges, mandarins, etc.	97.2	732.3	56.7
Grapefruits & other citrus fr.	6.1	46.5	3.6
Lemons	24.7	222.8	17.3
Total citrus	128.0	1,001.6	77.6
Almonds	1.9	81.8	4.3
Hazelnuts	4.7	222.0	17.2
Walnuts	2.2	77.0	6.0
Chestnuts	2.9	69.3	5.4
Pistachios	0.5	27.7	2.1
Other nuts	1.9	47.6	3.7
Total nuts	14.1	525.4	38.7
Total fruits	586.1	5,447.8	420.5

Table 3: Imports of Processed Fruits in 1999

Fruit type	Volume in 1,000 MT	Value in AS million	Value in US \$
Jams, marmalades	5.0	84.6	6.6
Fruits, nuts, preserved	3.3	23.4	1.8
Citrus skins	0.1	3.7	0.3
Strawberries, frozen	7.1	108.1	8.3
Raspberries & blackb., frozen	9.3	145.2	11.2
Other fruits frozen	12.6	214.3	16.6
Other fruit preparations, cans	54.5	1,088.4	84.3
Total processed fruits	91.9	1,667.7	129.1

Except exotic fruits, citrus fruits, and table grapes, all fruits are grown in Austria; however, in insufficient quantities. The main suppliers of citrus fruits are the Mediterranean countries. Apples and pears come predominantly from Italy and relatively large quantities of apples for processing are purchased by the juice industry from central European countries. In addition, small quantities of fresh apples are supplied by southern hemisphere countries such as South Africa, New Zealand, Chile, and Argentina. The bulk of strawberries comes from Spain. Table grapes are primarily imported from Italy, and Turkey, whereas berries (except strawberries) are mainly supplied by central European countries. Apricots and peaches come from Italy, Greece, Spain, and Hungary (only apricots). Turkey delivers the largest share of cherries. The primary suppliers of various tree nuts are Italy, Greece, Turkey, central European countries, and Iran.

Dried fruits currently come predominantly from Turkey and Italy.

The food industry imports large volumes of fruit pulp, mainly from central and south European countries. As there is no domestic production, the juice industry imports all citrus juices (concentrated), which are then reconstituted and packed for consumers. The juice industry is also involved in fruit pulp trade.

U.S. Opportunities

Due to shorter transportation and customs advantages of European and Mediterranean countries, the U.S. faces great competition on the Austrian market. Nevertheless, almost each year small quantities of table

pears, grapes, and grape fruits are imported from the U.S. It should be possible to increase these imports. U.S. grapefruits (main competitor is Israel) have been promoted by the agricultural office in Vienna. Good opportunities exist for U.S. raisins, berries, particularly cranberries, and nuts such as walnuts (main competitors are Greece and central European countries), pecans (minor imports from the U.S., no competition), hazelnuts (main competitors are Turkey and Italy), pistachios (main competitor is Iran), and almonds (main competitor is Spain). For the latter, the U.S. is already the largest supplier. Pecans are practically unknown in Austria. Market development would considerably increase demand for these fruits.

In addition, U.S. dried fruits (apricot, apple and pear pieces, dried berries, particularly cranberries, etc.) should find some market in Austria. Furthermore, there is a niche market for U.S. processed nuts such as smoked, sweetened, salted, flavored almonds and other nuts.

There is also a niche market for U.S. high quality concentrated orange and grapefruit juice, which is imported frozen and sold frozen in consumer size containers.

Fresh fruits are to be offered to fruit importers/wholesalers, canning industry, and supermarket chains, processed fruits to food importers and supermarket chains, concentrated citrus juice and fruit pulp to the juice industry, and fruit pulp only to the jam industry.

Health Standards

Maximum residue levels (MRLs) are regulated by the ordinances for pesticide MRLs. (ordinance # 228 published in the Federal Gazette of August 13, 1997 and ordinance # 438 published in the Federal Gazette of November 26, 1999). The regulations include MRLs in various products, mainly fruits and vegetables. For products, made of fruits (or vegetables), the corresponding figures are permitted. Austrian MRLs of pesticides on fruits/products are harmonized with EU regulations.

Dried fruits must not contain more than 30% water. Dried fruits containing more than 300 milligram sulfuric acid (calculated as sulfide) per kilo is regarded as not suitable for raw consumption.

Import Regulations

Imports of fresh fruits and dried fruits, except nuts and dried apple and pear cuts, must be accompanied by a common phytosanitary certificate.

The import duty (EU duty) for fresh fruits is calculated from the commodity value and import month. It is 2.4% - 20% of the commodity value plus 1 - 23 Euro/100 kg.

The import duty for other fruits/products is as follows:

a. Nuts

walnuts without shells	5.1% ad valorem
Pecans without shells	0 ad valorem
non-bitter almonds without shells	3.5% ad valorem
hazelnuts without shells	3.2% ad valorem
pistachios	1.6% ad valorem

b. Dried fruits

apricots	5.6% ad valorem
prunes	9.6% ad valorem
apples	3.2% ad valorem
peaches	5.6% ad valorem
citrus skins	1.6% ad valorem

c. Pulp of berries 12 - 20.8% ad valorem plus 8.4 Euro/100 kg

No import license is required for the afore mentioned products.

Austrian Food Wholesalers, Importers, Agents, and Supermarket Chains (Many import fruits)

Company: ADEG Handels AG

Contact: Mr. Alfred Wittner

Position: Import Department

Address: Gaudenzdorfer Guertel 41-45

A-1220 Vienna

Tel: [+43] (1) 811 46/141

Fax: [+43] (1) 811 46 168

Company: BILLA Warenhandel AG

Contact: Mag. Erich Riegler

Position: Director for Imports

Address: Industriezentrum NO Sud, Strasse 3, Objekt 16

A-2355 Wiener Neudorf

Tel: [+43] (2236) 6000/5120

Fax: [+43] (2236) 6000 85120

Company: Hofer KG

Contact: Mr. Lothar Melchart

Position: Director for Imports

Address: Hoferstrasse 1
A- 4642 Sattledt
Tel: [+43 (7244) 8000/54
Fax: [+43] (7244) 800046

Company: Julius Meinl AG
Contact: Mr. Karl Seiser
Position: Director for Imports
Address: Am Graben 19
A- 1010 Vienna
Tel: [+43] (1) 532 333 416
Fax: [+43] (1) 532 333 20

Company: Maresi Naehrmittel
Contact: Mr. Gottfried Eigner
Position: Director for Imports
Address: Werdertorg. 5 - 7
A- 1010 Vienna
Tel: [+43] (1) 8000/45
Fax: [+43] (7244) 8000 46

Company: M-Preis Warenvertriebsgesellschaft
Contact: Mag. Anton Moelk
Position: Director for Imports
Address: Landstrasse 16
A- 6176 Voels
Tel: [+43] (512) 300/131
Fax: [+43] (512) 31 31 120

Company: Maximarkt GesmbH
Contact: Mag. Dr. Franz Plank
Position: Director for Imports
Address: Backermuehlweg 61
A- 4034 Linz
Tel: [+43] (732) 37 57 77
Fax: [+43] (732) 37 57 77 216

Company: Metro
Contact: Mr. Heinz Roedlbach
Position: General Manager
Address: Ortstrasse 23-27
A-2331 Voesendorf
Tel: [+43] (1) 694 6000
Fax: [+43] (1) 69 26 60

Company: Pfeiffer Grosshandel
Contact: Prok. Gerhard Lassnig
Position: Director for Imports
Address: Egger-Lienz Strasse 15
A-5040 Traun
Tel: [+43] (7229) 685/1211
Fax: [+43] (7229) 685 1310

Company: Spar Oesterr. Warenhandels AG
Contact: Mag. Gebhart Graf
Position: Director for Imports
Address: Europastrasse 3
A-5015 Salzburg
Tel: [+43] (662) 4470/23700
Fax: [+43] (662) 4470 521

Company: VOG Einfuhr & Grosshandel
Contact: Mr. Otto Bruckner
Position: Vorstandsvorsitzender
Address: Baeckermuehlweg 44
A- 4020 Linz
Tel: [+43] (7323) 738 0
Fax: [+43] (7323) 73 82 07

Company: Wedl & Dick GesmbH
Contact: Mr. Leopold Wedl
Position:
Address: Dorfstrasse 18
A-6060 Mils
Tel: [+43] (5223) 303 00
Fax: [+43] (5223) 51 57 37

Company: Z-E-V Markant Zentrale Einkaufs-Vertriebs GesmbH
Contact: Prok. Manfred Gesell
Position: Director for Imports
Address: Leopoldgasse 4/1
A-1025 Vienna
Tel: [+43] (1) 21 45 695/29
Fax: [+43] (1) 21 45 695/34

Austrian Dry Fruit Importers

Farm Gold Handels-GmbH (dry fruit packer/wholesaler)

IZNOe Sued Str. 10 Obj 40
2355 Wiener Neudorf
Phone: +43(2236) 62 622
Fax: +43 (2236) 62 622 5

Kelly Ges.m.b. (snack producer)
Hermann Gebauerstr. 1
A-1220 Vienna
Phone: +43 (1) 73 273
Fax: +43 (1) 73 273 325 or 73 273 44

Austrian Fruit and/or Vegetable Canning Industry (fruit importers)

Kornherr OHG
A-2163 Ottenthal, Bez. Mistelbach
Phone: +43 (2554) 853 69
Fax: +43 (2554) 853 69 4

Efko Frischfrucht und Delikatessen Ges.m.b.H.
A-4070 Hinzenbach 38
Phone: +43 (7272) 4285
Fax: +43 (7272) 3575

Marchland Feinkost-Konserven Ges.m.b.H.
Oberwagram 30
A-4331 Naarn im Marchlande
Phone: +43 (7262) 58 634 or 58 127
Fax: +43 (7262) 58 634

Gemuese Verarbeitungs- Aktiengesellschaft
Seestr. 17b
A-7100 Neusiedl am See
Phone: +43 (2167) 8175
Fax: +43 (2167) 8175 21

Suedburgenlaendische Obst- und
Gemueseeveredelungs G.m.b.H.
Wienerstr. 18
A-7551 Stegersbach
Phone: +43 (3326) 52 355
Fax: +43 (3326) 52 355 15

Brueder Unterweger, Obstverwertung

A-991 Thal 60
Phone: +43 (4855) 8111
Fax: +43 (4855) 8111 13

Erwin Gegenbauer
Waldg. 3
A-1100 Vienna
Brueder Unterweger, Obstverwertung
A-991 Thal 60
Phone: +43 (1) 604 10 88
Fax: +43 (1) 604 5160

Austrian Jam Producers (Pulp Importers)

Adolf Darbo Aktienges.m.b.h.
Durnau 18
A-6135 Stans, Unterinntal
Phone: +43 (5242) 6951
Fax: +43 (5242) 6951 33

Dkfm. Hans Staud
Huberg. 3
A-1160 Vienna
Phone: +43 (1) 40 68 805
Fax: +43 (1) 40 68 805 12

Breganzia Konservenfabrik Dr. B. & H. Sagmeister
Landstr. 1
A-6911 Lochau
Phone: +43(5574) 42 205
Fax: +43 (5574) 42 205 9

YBSIAS Fruchtzubereitung Ges.m.b.H.
A-3363 Kroellendorf 45
Phone: +43(7448) 3848 or 7027
Fax: +43 (7448) 3848 38

S. Spitz Ges.m.b.H.
Fiedlerstr. 10
A-4040 Linz
Phone: +43(732) 7079
Fax: +43 (732) 738 107

Brueder Unterweger, Obstverwertung

A-991 Thal 60

Phone: +43 (4855) 8111

Fax: +43 (4855) 8111 13

Austrian Fruit Juice Producers (Importers of Citrus and Berry Concentrates)

Ybbstaler Fruchtsaft Ges.m.b.H.

A-3363 Kroellendorf 45

Phone: +43 (7448) 2304

Fax: +43 (7448) 2304 8

S. Spitz Ges.m.b.H.

Fiedlerstr. 10

A-4040 Linz

Phone: +43(732) 7079

Fax: +43 (732) 738 107

Rauch Fruchtsaeft Ges.m.b.H.

Langg. 1

A-6830 Rankweil

Phone: +43(5522) 401

Fax: +43 (5522) 401 3

Hermann Pfanner Getraenke Ges.m.b.H.

Alte Landstr. 10

A-6923 Lauterach

Phone: +43 (5574) 6720

Fax: +43 (5574) 79504

Steirerobst Aktiengesellschaft,

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muehlwaldstr. 1

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Phone: +43 (3112) 2226

Fax: +43 (3112) 2226 1

Pago Fruchtsaeft Ges.m.b.H.

Schroedingerstr. 61

A-9020 Klagenfurt

Phone: +43 (463) 33 444 or 319 660

Fax: +43 (463) 319 309 or 381 988

Fruit Importers/Wholesalers

Josef Ahorner GesmbH.
Laxenburger Str. 365
Grossmarkt Inzersdorf
Halle B1, Std 1-7
A-1230 Vienna
Phone: +43 (1) 6002
Fax: +43 (1) 616 67 37

Traisentaler Fruchthof Sommer Gembh & Co KG
Hainfelder Str. 20
A-3160 Traisen
Phone: +43 (2762) 52 382
Fax: +43 (2762) 53 805

Karonitsch Ges.m.b.H.
Grossmarkt Inzersdorf
365 Std A 2 4/5
A-1230 Vienna
Phone: +43 (1) 616 7006 or 615 3799
Fax: +43 (1) 616 7155

Obst Huber Fruchtimport Ges.m.b.H.
Neinergutstr. 28-30
A-4600 Wels
Phone: +43 (7242) 404
Fax: +43 (7242) 404 20

Zeilberger fruit-service AG
Linzer Str. 92
A-4600 Wels
Phone: +43 (2762) 52 382
Fax: +43 (2762) 53 805

Rudolf Schwaighofer Ges.m.b.H. & Co.Kg.
Maxglaner Hauptstr. 16a
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Amraser Str. 6

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Fax: +43 512) 520 15 15